

CHAPTER 7

DIRECTIONS OF CHANGES IN THE MANAGEMENT OF POLISH NGOS IN PROCESSES OF GOVERNMENTALISATION AND MARKETISATION

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Introduction

In the recent years, non-governmental organisations have been affected by the process of hybridisation, i.e. gradual blurring of differences, in which organisations from various sectors start to resemble one another, and creating networks of interdependencies (Bogacz-Wojtanowska, 2013) sometimes termed absorption, or institutional isomorphism (Craig, Porter, 2004). These processes, identified in the 1970s, are particularly visible in countries with a well-developed NGO sector (Kramer, 1998), while in Poland they are only at the initial stage of development.

Hybridisation processes can be linked to two changes occurring in many NGOs. Firstly, the development of products and services in the NGO activity, resulting in the reinforcement of business activity in NGOs (“marketisation”, used interchangeably with “commercialisation”). Secondly, NGOs that use the public sector’s support can gradually become similar to public organisations through the bureaucratisation of the ways in which they operate, stiffening their organisational structures or changing their organisational culture (“governmentalisation”).

The objective of this paper is a critical presentation and assessment of the major directions of development of NGO management with reference to marketisation and governmentalisation processes. From a number of existing directions of changes, three were selected: financial management, quality management and management of learning (knowledge) processes in the organisation.

Hybridisation, governmentalisation, and marketisation as processes affecting third sector organisations.

Hybridisation of NGOs is well identified by researchers of the third sector, and it manifests in (Bogacz-Wojtanowska, 2013):

- homogenisation of organisational cultures, especially in the area of organisational behaviour patterns;
- adaptation for the non-governmental sector of management methods and techniques, previously typical only for enterprises;
- creation and proliferation of new organisational forms: quasi-non-governmental, or quasi-private organisations called hybrids (e.g. popular in Poland corporate foundations created for the purpose of executing social objectives, but promoting enterprises that create them).
- creating new organisational structures, adapted to intersectoral networks.

Hybridisation of NGOs is also accompanied by processes of differentiation of the civic sector as well as recombination and refunctionalisation, which lead to the creation of new organisational forms (Romanelli, 1991; Anheier, 2006). Recombination means the introduction of new management methods and techniques and organisational structures not typical for organisations from the selected sector (e.g. marketisation). Whereas, refunctionalisation means the move of NGOs into the area previously occupied by public or private sector organisations, as well as processes of governmentalisation and commercialisation (Bogacz-Wojtanowska, 2013).

Academics approach the concept of governmentalisation in two ways. L. M. Salamon (1987, 1993) believed that the cooperation of public organisations and NGOs, that has been developing since the 1980s, is built on the principle of partnership, symmetric relations and it does not cause the increase of power, domination or advantage of one of the parties. Whereas M. Lipsky and S. R. Smith (1989) were of a different opinion, claiming that through the cooperation with the public sector, NGOs lose independence, which increases the influence of the public sector. Governmentalisation leads to the loss of autonomy, stronger formalisation and changes in creating organisational missions and objectives, particularly in areas on the border of or in cooperation with the public sector (Bogacz-Wojtanowska, 2013). The increase of the non-governmental sector's importance in providing public services is for some an evidence of an intersectoral partnership (Salamon, 2003), while for others it is a dangerous trend from the perspective of the traditional functions of NGOs (the ideal of independence), which proves their gradual governmentalisation. It is also remarked that

intersectoral cooperation in the conditions of the dominant position of public organisations or the traditional administrative culture (particularly in the countries of the former Eastern Bloc) may deepen the phenomenon of governmentalisation in correlation with social processes such as low social activity, weakness of civic bonds, or low level of mutual trust (Swianiewicz, 2008, p. 82).

The process of marketisation or commercialisation of the third sector (Eikenberry, Drapal, Kluver, 2004, pp. 132-140), is understood as a progressive activity in the area of business activity. It means employing business strategies to acquire resources, market methods, and values for the purpose of acquiring contracts from the public sector and developing social entrepreneurship, and finally making NGOs similar to business enterprises in terms of structure, culture, and manner of operating (Bogacz-Wojtanowska, 2013). Development of the economic function, particularly social entrepreneurship (as one of the areas of marketisation of the third sector) is considered a way to become independent from the public sector financing, and avoid its pathologies (Hausner, 2012). On the other hand, it can result in the decrease of social legitimisation and possibly limitation of access to resources. It can also contribute to the decrease of trust and relationships between the organisation and its cooperants, weaken social networks, and lead to a decrease in volunteers' commitment (Backman, Smith, 2000). It should be also taken into account that marketisation processes can involve a more universal use of the form of NGOs for business activity, which enable profiting from third sector tax privileges, so rather shady intentions. However, the results of studies carried out in Poland since 2003 have unambiguously indicated a systematic decrease in the income from business activity of NGOs, while the income from paid statutory activity has been growing (Herbst, Przewłocka, 2011, p. 76).

Financial management in NGOs

One of the factors that determine initiating activities by organisations, including NGOs, are financial resources. The financial dimension of an organisation's functioning does not concern only the amount of financial means at its disposal, but also their character, understood as sources of financing, manner and frequency of acquisition, stability and possibilities of planning income. In a competitive environment, the ability to identify and use new sources of financing and their diversification is of no small importance.

The observation of NGOs operating in Poland allows speaking about a certain specificity of such organisations. Studies show that the financial situation of NGOs is gradually improving. It is expressed in the increasing level of NGOs' income, the reduction of the percentage of the poorest organisations, and the

expansion of the so-called “middle class” of the organisations. A visible correlation exists between the age of an organisation and its financial situation, which means that the longer the organisations operate (the “older” non-governmental sector), the larger its resources are (more broadly: Adamiak, Charycka, Gumkowska, 2016). Unfortunately, huge diversity of Polish organisations leads to a considerable stratification of the sector. It means that a small group of organisations (10%), manages the majority of the sector’s resources (80%). The characteristic feature of a significant part of the sector is also the lack of financial stability. To a large extent this is the result of a strong connection with public partners, which can lead to the aforementioned governmentalisation of these organisations and cause certain negative consequences. On the other hand, we can observe taking actions typical for business entities, i.e. marketisation in the broad sense of the term. As a result, it is possible to indicate several action directions (strategies) of Polish organisations in the area of finances which are not mutually exclusive.

Financial strategies of the third sector

The specificity of the first – “public” – direction lies in financing an organisation’s operations with funds from the public sector. Data concerning the financial situation of NGOs in Poland from the last several dozen years indicate that it is the most popular form of NGO financing (understood as the number of organisations using a given source). It is true that organisations increasingly often point to membership fees, but this is a form available only to associations and it is significant primarily for small organisations. Within such an understanding, means derived from self-government sources, declared by over a half of the organisations, play the key part (Adamiak, Charycka, Gumkowska, 2016). The idea of handing to organisations means for a better execution of public tasks stems from a conviction about a better identification of problems and ways to resolve them by entities located “closer” to the citizen, greater efficiency of actions, or a higher level of social trust. Such a mechanism allows both entrusting public tasks to be executed in full (including their full financing), as well as the support for the execution of these tasks (co-financing with the requirement of an organisation’s own contribution); but it has its limits, including the asymmetry of parties, or dependence on public partners in the economic dimension (problems in the case of the limitation or lack of public funding), and organisational dimension (change in the way the organisation operates).

There are two ways of using public funds. On the one hand, the organisation plays the role of the “executor” of the public task and on the other hand, it becomes the “intermediary”. It is connected with the so-called regranteeing, i.e.

a two-step mechanism of outsourcing public tasks, in which public funds received by an NGO are distributed among other organisations in the form of grants – the organisation that transfers these funds becomes “the operator” responsible for handling the public task (for more, see: Schimanek, 2016). It is difficult to compare the aforementioned roles of “the executor” and “the intermediary” (currently dominant is the mechanism of direct contracting of tasks), but these types of actions can be considered as one of the more promising directions of functioning and acquiring funds by organisations.

One of the most important features of NGOs is the way they are financed, which combines income from commercial activity with public and private funds. What becomes important in this three-part model of NGO funding (Salamon, Anheier, 1999) is the determination of proportions between these elements, and their diversification to avoid dependency from the biggest donors (Toepler, Anheier, 2003). In this context, the key aspect needs to be the development of fundraising capacities.

The point of departure for fundraising actions of the organisation is the generosity of individuals, institutions, and business entities. However, while in the USA and Western Europe philanthropic behaviour constitutes a constant element of functioning or operational culture, it is not possible to say that such behaviours are established in Poland. Nevertheless, fundraising means the possibility of an alternative to public funding in financing an organisation’s own activity by using such sources as public fundraisers, donations, or the 1% mechanism. Thus, beside the “public” direction of actions in the financial sphere, also the “private” direction emerges, and it is necessary to use it – by acquiring individual and institutional donors and tying them permanently to the organisation (a focus not only on the current and long-term action objective of the organisation and its values – cf. Peter-Bombik, 2015) – in order to ensure financial diversification and stability.

Financial stability is an organisation’s ability to operate in the long term, in changing circumstances – including financial ones. It means that the organisation (as the “stabiliser”) has resources that in situations of crisis can be used without risking the loss of liquidity and threat to operations. An important role here is played by endowments. This capital, understood as “the set of funds generating profit which is used to finance the execution of statutory objectives” (Liżewski, 2016), must be kept intact without the possibility to be used for current expenses, and it constitutes the basis for funding future activities. It is a “working” capital which – with proper management – should grow and with time be able to replace (at least partially) other sources of financing. Creating capitals that remain intact is not a popular practice in Poland (no tradition, current needs), and possible investments include bank deposits or debt securities.

Non-governmental organisations and their financing

The system of financing NGOs based on public funds is characteristic of small entities, particularly organisations operating in rural areas. Unfortunately, their undoubted effectiveness and activity often goes together with the incapacity to seek out and acquire other sources of funding, which leads to an organisation's dependency on public partners. On the other hand, assuming the role of an "intermediary" is typical for organisations that in their circles (usually local as well) function as leaders. To a large degree it stems from their openness to changes, aiming at the activation of local communities, building networks of cooperation and larger organisational potential. In the case of fundraising activities, it would be difficult to point out any characteristics of NGOs for which such activities are typical. It should be emphasised, however, that as the research shows, the number of organisations declaring multiple sources of funding, including non-public ones, is growing. Fundraising capability depends to a large extent on the activity and skills of an organisation's managers, as well as the level of trust in its activities.

The presented roles of the organisation in the financial sphere can be complementary. A good example of Polish NGOs that skilfully combine the discussed directions ("executor", "intermediary", "diversificator", and "stabiliser") are local funds. Some of their more noteworthy features include: gathering endowments that remain intact, providing services for benefactors, actions for local communities – often in the role of a leader. Despite the small number of local funds (currently there are over 30 operating), these organisations are thriving, based primarily on financing from such sources as donations, grants, and stipends. However, this activity is possible thanks to resources at funds' disposal that come from both private donors and funds which constitute a part of the continuously increasing endowment (also by investing in real estates). Moreover, funds – due to their leadership role – often function as operators in regranting activities, as well as contractors of public tasks contracted by local governments.

Quality management in the non-governmental sector

In the 21st century quality is not regarded as an area connected exclusively with production or providing services (Szczepańska, 2011), but as a general management philosophy which determines strategic thinking (Lisiecka, 2002), supporting ethical dimension of organisation's operation (Halis et al., 2007). The broadening of the conceptual spectrum resulted in the forming of the so-called Total Quality Management (TQM) – a concept encompassing a number of general indications of qualitative thinking (Harari, 1993; Hackman, Wageman, 1995),

rather than the set of specific management tools (Svensson, 2005; Wolniak, Skotnicka-Zasadzień, 2010).

Due to this universalisation, the spread of quality beyond the private sector was observed (Schroeder et al., 2005). It was assumed that TQM is an adequate concept for non-governmental entities as well – in this case, it was pointed out that these organisations are more inclined to allot a financial surplus for improving standards of operations (Cleveland, Krashinsky, 2009), and undertake innovation (Bode, 2014). It was suggested that the orientation on quality supports building social legitimisation, constituting the way to ensure independence of third sector entities from norms and limitations of the public sphere (Buckingham, 2010; Powell, 2013; Bode, 2014). Managerial benefits, resulting from the application of certification practices in non-governmental entities were emphasised as well (O'Reilly et al., 2013).

At the same time, transplanting the concept of quality management to civic activism was not free of controversy. The danger that was indicated lies in imposing on NGOs an economic perspective which defines their role as marketised providers of social services rather than guardians of civic society values (cf. Gliški, 2012; Bode, 2014). It was suggested that by promoting concepts inadequate for the third sector, its entities may lose their identity (cf. Paton et al., 2000; Botcheva et al., 2002). The influence of quality management techniques on the increase in the effectiveness of third sector activities remained a moot point as well (cf. Cairns et al., 2005; Chesteen et al., 2005; Decker, 2008; Suda, 2011).

Despite controversy, NGOs started to adopt the TQM perspective. On the one hand, the third sector realised the utility of these concepts in their activities (Boerner, 2004); on the other hand, it was forced to adapt to the increasing pressure of external expectations from both individual donors (Forbes, 1998, Eisinger, 2002; Wing, 2004, Bode, 2014), and the public sector (Schuster, 1997; Eikenberry, Kluwer, 2004; Henriksen et al., 2012). In this context, certain researchers formulated opinions to the effect that TQM could constitute a tool of oppression toward non-governmental activities (Bode, 2014).

Quality in Polish non-governmental organisations

Depending on the dominant source of funding, two extreme perspectives of regarding the issue of quality can be discerned, causing various consequences for the role of non-governmental entities in society and the strategic capability of their development. On the one hand, less affluent organisations – most of the Polish NGO sector – are forced to use public funds and adopt its managerial perspective. In this context, quality management can be considered as a tool strengthening marketisation and governmentalisation tendencies. On the other

hand, entities that are more affluent or have access to alternative sources of funding are in a comfortable enough position to adapt quality management concepts to their needs, which enables them to maintain independence and execute their social mission more efficiently.

Quality management in organisations financed by public means

In entities that base their activity on public funds, quality assumes an economic-production form, becoming the same as ensuring effectiveness. In this case standards are imposed top-down, and refer to the administrative perspective of legitimacy, standardising and uniformising actions. In organisations that use grants, conformism toward imposing norms by the public sector can be observed – also in relation to the idea of certification – which should be considered as a case of advanced governmentalisation.

An example of an organisation of this type can be a foundation from Cracow that conducts activities in the area of promoting culture and art – the organiser of a large artistic event of international renown. Due to its field of activity, it uses local government funding, which in the framework of an agreement binding for many years, provides enough funds that the organisation – despite its status of a of public benefit organisation (Polish Journal of Laws 2003 No. 96 item 873 as amended) – does not conduct promotional campaigns to obtain funds through the 1% mechanism.

The strategic perspective of the foundation demands focus on meeting the expectations of the local government which is regarded as the key stakeholder-recipient of activities. Any kind of evaluation (e.g. audience surveys) is carried out exclusively to meet a project's requirements – they are not used as valuable feedback. In the work of the management, it is more important to develop relationships with persons responsible for allocating funding (officials, politicians) than caring about developing competences of employees whose role amounts to executing centrally prepared decisions.

Quality in organisations financed from private donations

These non-governmental entities that build organisational capabilities regardless of the public sphere, consider quality in more flexible terms – as an ethical obligation to continually better themselves, the support of strategic reflexion. In such cases norms are not imposed top-down, but designed by an organisation's stakeholders (mostly employees and recipients of activities) in the course of consultation processes. In these entities, certification appears as an opportunity for development, rather than a set of rigorous norms and guidelines.

An example of an entity that implements this thinking can be provided by a Polish branch of an international movement for environmental education and environmental protection advocacy. To avoid a conflict of interests, the organisation decided to develop independent fundraising practices (eliminating sponsoring and public funding). Despite initial difficulties (the need to take a loan from the international central), the current income from individual donors enables its independent project activity, assessed exclusively with reference to internally developed criteria. It is noteworthy that the organisation did not adopt the marketised perspective of effectiveness, focusing instead on the growth of social legitimacy of their activities.

Bearing in mind the ontologically motivated ambition to enhance its own efficiency, the organisation developed a number of managerial practices that relate to the pro-quality perspective. A lot of attention is paid to employee competences and knowledge management (e.g. creating an IT database of executed projects). Despite an elaborate and decentralised structure, the application of indicators adopted to the specificity of activities not only enables to coordinate the extended project portfolio, but also supports innovation in its activities. Thus, the organisation expands the circle of its donors and volunteers, and increases organisational capabilities, playing an increasingly important role in the process of establishing public policies.

Learning in non-governmental organisations

NGOs consider the necessity for learning and knowledge management to be increasingly important for fulfilling their function. Aspects that are regarded as significant are the organisation's absorption capacities, i.e. learning, expanding knowledge and experiences; ability to recognise the value of the new information and knowledge in the environment, to learn and apply it to achieve objectives more efficiently and effectively (Cohen, Levinthal, 1990).

Organisations require various types of knowledge (Rathi, Given, Forcier, 2016):

- about management and organisational practices;
- about financial, physical, human, and intellectual resources;
- about people in the organisation, donors and the community they serve;
- areas/sector in which the organisation operates, or a domain or specialised knowledge required to achieve organisational objectives;

- contextual external knowledge (i.e. from outside the organisation, community, and sector), that can potentially influence the activity of the organisation.

There are three ways to develop learning by the organisation – passive, active, and interactive, and each of them provides diverse knowledge (Lane, Lubatkin 1998, p. 462). Passive means absorbing open and easily accessible knowledge at various conferences, seminars and workshops. Active involves gaining knowledge through benchmarking from other organisations. Both of these ways serve acquiring available knowledge which is not unique in its character. Only the interactive way concerns the tacit and unique knowledge, rooted in the social context of the organisation's operation, obtainable only through interactions (Lane, Lubatkin, 1998, p. 463). Acquiring easily accessible, but still new knowledge, can be a way to confirm the possibility of realising the mission, and proving that the organisation can be trusted and entrusted with financial means to execute its activities (Bogacz-Wojtanowska, 2013). Usually, the absorption of knowledge in NGOs occurs in a little formalised way, with a small involvement of resources – the focus on the realisation of objectives and mission causes a lack of interest in knowledge management (Hume, Hume, 2016).

Knowledge acquired by the organisation must be processed by it – therefore knowledge management in the third sector does not mean only knowledge acquisition, but also the ability to recognise its value and adapt it to the organisation's needs. According to S. Zahra and G. George (2002, pp. 189-191), absorption of knowledge may depend on the following skills:

- identification and acquisition of external information and knowledge;
- assimilation – initiation of processes of analysis, interpretation, and understanding of the acquired information and knowledge;
- transformation – development and improvement of action processes thanks to a synergic combination of the already existing with the newly acquired and assimilated knowledge;
- usage – application of knowledge.

Absorption capacities and knowledge management lead to the creation of intellectual capital related to intangible resources of the NGO (knowledge, employee experience, customer trust, IT systems, patents, trademarks, brand, etc.).

Complementary to NGOs' absorption capacities is the ability to diffuse their solutions to other organisations, which is called desorption, and constitutes one of the areas of knowledge management in the organisation. In commercial organisations, this capacity most often means the ability to transfer technology (Lichtenthaler, Lichtenthaler, 2010, pp. 157-159). In the case of NGOs, knowledge diffusion means the identification of the possibility of transmitting

ideas or developing ways to operate as well as the support of the organisation that receives and absorbs the idea. An NGO can inscribe in its own strategies a gradual introduction of social change, develop a way to effectively solve problems in the local community, implement the way to execute the social service. Often it can use experiences of other organisations – it subjected itself to diffusion, for instance thanks to a foreign NGO. The basis for this type of capabilities is the ability to prepare an idea, implementation of a replicable service, or identification of other organisations potentially interested in the implementation, as well as transmission and support of the receiving organisation. Identified obstacles to sharing knowledge outside the organisation result from weak social interactions and the lack of the organisation's social network, weak organisational culture and undeveloped organisational structures, staff turnover, operational and strategic weakness of the organisation as well as competitive attitudes toward other third sector entities (Bloice, Burnett, 2016).

Knowledge in Polish NGOs in relation to governmentalisation

Knowledge, considered to be an organisational resource that impacts the execution of an organisation's objectives (Kozuch, 2011), enables as well to balance financial weaknesses. The possession of knowledge in terms of expectations and social needs can sometimes be the cause of initiating cooperation with the public sector. NGOs are regarded as those that have explicit and at the same time difficult to obtain knowledge about selected areas of the social reality. What is important, unique knowledge can determine the success of an NGO and its relationships with other sectors – familiarity with problems combined with social sensitivity, empathy or involvement yields the effect of synergy, attractive for public and private organisations (Bogacz-Wojtanowska, 2013). At the same time, a certain portion of NGOs in Poland do not have knowledge in the area of their operation, but have both a positive and demanding attitude toward cooperation for the purpose of resource acquisition (Bogacz-Wojtanowska et al., 2010).

It should be noted that knowledge absorption enables civic organisations their continuous development, execution of organisational goals, and long life (Chen, Hung, Tseng, 2010). Wanting to acquire knowledge from their partners, NGOs must first demonstrate their intent to learn, susceptibility to and orientation on knowledge, as well as transparency (Hamel, 1991). The level of these factors can result in various outcomes in the form of actions taken as a result of the acquired knowledge.

In Poland, the absorption occurs within relations between non-governmental and public entities, as the public sector requires concrete information from the non-governmental sector, recognising its competence in the area

of its own activity (Bogacz-Wojtanowska, 2011). The execution of public tasks by an NGO requires also using its intellectual capital – especially substantial knowledge concerning the planned tasks. Therefore, an NGO that received from the Polish local government an assignment to prepare a trip for senior citizens, should organise it, ensure safe travelling conditions for the participants, according to the regulations, as well as appropriate entertainment. What is required for this purpose is information about the needs of senior citizens, as well as the knowledge about how to meet them.

As to social consultations, for organisations that are just starting their cooperation, they can be a source of knowledge about other organisations, local government, and the environment in which they operate. Meanwhile, those that have been participating in consultations for years, diffuse knowledge to the local community and other organisations.

It should also be added that for certain NGOs, particularly small associations, learning from other third sector organisations within networks and forums can be an impulse to take up new tasks, previously regarded as difficult.

Absorption and diffusion in an NGO

Absorption of knowledge, to varying degrees, concerns practically every NGO. Rarely, however, do NGOs undertake desorption to other organisations. An example of absorption and desorption of knowledge are infrastructural organisations providing services for others, which makes them centres of knowledge diffusion.

An example of both absorption and diffusion of knowledge in Polish NGOs is one of the national associations conducting activities for children in danger of breaking family ties. The organisation runs its own children's homes, and supports other homes and facilities financially. The absorption started when the organisation acquired the licence to use the American training programme for the candidates for foster and adoptive parents. The association adapted the programme to Polish conditions as many as three times, in the last instance introducing numerous points connected with the reform of the foster care system (according to the Act on Family Support and Foster Families introduced in 2011). Starting in the year 2000, after each adaptation, the organisation prepared coaches to train foster families. The diffusion of the approach was not caused by the organisation's own decision – during meetings and conferences organised by international partners, the foster care community fully accepted the organisation's ideas. The effect of the diffusion in the course of 12 years is 250 programme coaches trained by the organisation and 150 cities benefitting from

the programme. What is important, the diffusion flowed from an NGO to the public sector, and the absorption – from another NGO.

Summary

The recent years brought worldwide development of managerial thinking and practices in the third sector, but these processes are barely identified within the Polish non-governmental sector. Polish organisations are considerably more influenced by the public sector, which often results in too close relationships, dependence from public financial resources, and advancing institutionalisation. Perhaps the state's retreat from a broad partnership with NGOs, widely regarded as disadvantageous and dangerous to the Polish democracy, that could be observed for the past two years at the central level, will turn out to be the saving grace and will stop the processes of governmentalisation. In search of the sources of funding other than public, increasing the quality of services and learning new rules, relations and principles; perhaps we will witness the emergence of a new formula of the third sector in Poland. Keeping in mind, of course, the leading principle of heterogeneity and diversity of NGOs' objectives, stemming from unlimited human needs.

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